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1	UNITED STATES DISTRICT COURT	
2	NORTHERN DISTRICT OF ALABAMA SOUTHERN DIVISION	
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5	LINDA STOUT, et al., CV-	65-MHH-396-S
6	Plaintiffs, Nov	vember 10, 2015
7	vs. Bir	mingham, Alabama
8	JEFFERSON COUNTY BOARD OF EDUCATION, et al., 10:	00 a.m.
9	Defendants.	00 a.m.
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12	REPORTER'S OFFICIAL TRANSCRIPT OF	
13	HEARING	
14	UNITED STATES DISTRICT JUDGE	
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23	COURT REPORTER:	
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PROCEEDINGS

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THE COURT: All right. We are here this morning in case number 65-396. This is Stout vs. Jefferson County Board of Education.

The Court received a request from counsel for the City of Gardendale to meet with counsel for all the parties to discuss the status of their work on trying to develop information that would allow the private plaintiffs and the United States to evaluate Gardendale's proposal for separation from the Jefferson County School System.

So, why don't I begin, please, with counsel for the City of Gardendale and hear from you.

MR. ROWE: Thank you, Your Honor. Steve Rowe appearing for City of Gardendale. Just as a prefatory The last time this group gathered, Giles Perkins matter: was standing here for the City of Gardendale; shortly after that hearing, he was diagnosed with a serious health matter and he's had to cut back on his practice substantially. sends his best regards.

THE COURT: I hate to hear that.

It's actually looking much better for MR. ROWE: him now than it was from the beginning, but still he's -with chemotherapy and so forth, he's not able to maintain a full practice.

THE COURT: Please give him my best.

MR. ROWE: I will. In a nutshell, you know, we're here because it is the hope of Gardendale and its aim to have any issues that are raised regarding its plan of separation decided in time for it to separate by the next school year which would be 2015-2016.

In order to do that, we have to --

THE COURT: 2016-2017.

MR. ROWE: Yes, Your Honor, I misspoke. Thank you. In order to do that, we have to have an agreement or an order of the Court or we have to resolve the issues in time for that to happen, which will be no later than April, May of next year.

We had a call -- I had a conference call yesterday discussing these issues since we have been seeking to find out, since we issued our plan in March, what the issues were. And, of course, the other parties can speak for themselves on what those issues are.

But I think that the summary of our call yesterday was that, and maybe I'm a hopeful optimist, I talked to the parties about resolution, and I think there's — there's value in seeking to reach a resolution without spending a whole lot of money on experts and court time, but that remains to be seen whether that can be done.

And as Judge Clemon suggested yesterday during our call, and I fully agree, I think the other parties do, that we need to get a date, get some dates on your calendar for a hearing and have a plan in process, and if the parties are able to reach an agreement that is acceptable to the Court in that time, then the hearing wouldn't be necessary.

But the hearing dates will cause us to do what we need to do in that regard as well.

Let me just briefly tell you what's happened since the last time we were here. There's been a substantial amount of information swapped. After the school year started in September, there was a trip made to the Gardendale schools by the parties, actually the individual plaintiffs were not able to attend that, but everyone at the Department of Justice and its expert and Gardendale and its expert and the county all walked through and asked questions of various people in the Gardendale schools in September.

We've had the call yesterday and documents swapped and that's probably, you know, that summarizes what has happened.

So, we're not exactly sure at this point what the points of dispute, should we say, you know, are there particular items that we could address and change in our plan that would make it acceptable or is it just purely no possible way to resolve the matter. So I think that's an

outstanding question at this point.

Are there any other issues that Your Honor was hoping that I would address?

THE COURT: I think that's a good introduction to the issues that are before the Court.

Let me hear from counsel for the other parties involved and then we'll probably circle back.

MR. ROWE: Thank you.

THE COURT: Thank you, Mr. Rowe. All right. Why don't I hear from counsel for Jefferson County, please.

MR. COLVIN: Yes, Your Honor, Whit Colvin for the Jefferson County School Board.

As Mr. Rowe said, there's been a good bit of information swapped up to this point. Jefferson County is in the position of, we're really responding to requests more than anything else, at this point, it's not our plan, and so we're cooperating to the extent that we can.

We have received a request from Gardendale for updated information for this school year and we're currently in the process of processing that and preparing those reports so we can get those to them.

There are no real concerns that are schedule-related for us at this point except that there are some windows that we will need to reach, I think, before moving forward, if there is a separation.

We don't want to be too squeezed for time at the beginning of the school year, for example, simply because it's -- having been through this several times, it's a difficult process and there's a lot mechanically to be done, once the decision is made to separate and permission is given.

So, out of respect for the other thirty thousand kids that we are going to have left, we do hope that whatever schedule we end up working out and the Court ends up approving, will afford Jefferson County sufficient time to not have to shut down all of its other operations just to devote to a changeover, if there is one.

THE COURT: Sure. If I remember correctly, when we were discussing potential separation for the 2015-2016 school year, it seemed like July 1st was an absolute cut off, so thinking backwards from there is what we would have to do, if the Court felt like it had a record before it that would allow it to either -- to approve a separation, the Court has questions about the global situation in Jefferson County, that we've discussed before, that we'll need to address before we can even cross that bridge.

MR. COLVIN: Yes, Your Honor. July 1 is that traditional date that we have seen in other school separations and that is a date that has worked in the past, and I think the one that we contemplated for the 15-16

school year, as you say, Your Honor.

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THE COURT: Okay.

MR. COLVIN: I think that's it for now. But we're happy to answer questions as they arise through the course of these proceedings as well.

THE COURT: Thank you, Mr. Colvin. Let me hear please from counsel for the private plaintiffs.

MS. LIN-LUSE: Good morning, Your Honor. Monique Lin-Luse for the private plaintiffs.

We are today in support of our counsel, our colleagues here, asking for a period of more formal discovery is what we think as plaintiffs, definitely start looking for a scheduling order from the Court to sort of provide a little more structure to this process. Understanding that, you know, July 1 is an important date, but also given the gravity and importance of the issues here, we would like to see about six months of formal discovery, particularly to have enough time for expert reports, depositions that need to take place, and then also accounting for lost time at the end of the year. particular, our expert has a very full calendar and, in fact, was unable to attend with the other parties. However, plaintiff's counsel has visited the schools previously prior to our last hearing date and then some thereafter or our last conference date.

So basically where we stand is that we have still have -- continue to have concerns regarding the separation and think at this point that it's time to move into a more structured process.

And I'd be happy to answer any other questions that the Court may have.

THE COURT: Who is your expert?

MS. LIN-LUSE: Our expert is Dr. Leonard Stevens.

THE COURT: What is the nature of his expertise?

MS. LIN-LUSE: Dr. Stevens is a -- he is an expert in desegregation and particularly looking at the impact to the education of students, which is also analysis of faculty and staff assignment, student assignment. He's been an expert in desegregation cases for many decades, almost forty years.

THE COURT: In what systems has he worked?

MS. LIN-LUSE: So, he has worked, actually, within the litigation with the State of Alabama and the State Department of Education he's involved in, he's involved in the St. Martin Parish in Louisiana, he was involved in desegregation of the Cleveland schools, so cases throughout the southeast as well as -- the north as well.

THE COURT: Have you all discussed what you have in mind in terms of formal discovery and have you all discussed a proposed scheduling order yet?

1 MS. LIN-LUSE: No, Your Honor, the parties have 2 not come together with a proposed scheduling order. 3 THE COURT: Have you been able to get most of the information that you have requested informally so far? 4 5 MS. LIN-LUSE: Yes. However, concerns have been 6 expressed to us by members of the community and members of our class that we would think would need additional, have 7 8 come just in the past several weeks, that we think would 9 need additional discovery that probably would be better 10 suited for a more formal discovery process. 11 THE COURT: Okay. Thank you, Ms. Lin-Luse. 12 MS. LIN-LUSE: Thank you. 13 THE COURT: Let me hear from counsel for the United States. 14 15 MS. PERCIA: Good morning, Your Honor. Veronica Percia on behalf of the United States. 16 17 So, since we last met, we've reviewed Gardendale's 18 separation plan and we've also reviewed dated and 19 information provided by Jefferson County, specifically 20 regarding students in schools that are likely to be impacted 21 by the split. 22 We have also retained experts, one is Matt 23 Cropper, who is an expert tomographer, I think you're

familiar with him from Huntsville and Fred Berg who is a

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facilities expert.

As part of our assessment, as counsel mentioned, we visited, along with our facilities expert, eleven schools in and around Gardendale, toured each of the schools and their grounds and interviewed principals and other members of the school staff and administration.

After reviewing information we have so far, we do have concerns, pretty specific concerns, about the desegregation implications of the split. In particular the impact that the separation will have on -- it's being called transitioned zone students, so those students that are currently attending Gardendale schools but live outside the city limits would have to be rezoned to different Jefferson County schools.

We have been trying to get a handle on what the world might look like in the aftermath of a split, if it were to go forward as proposed, and that's really the work that we've been doing.

I'm happy to sort of describe the methodology that we have been using and some of our more specific concerns, if you think that is helpful at this point.

Otherwise, if it's better for the Court and the parties, we were actually anticipating maybe a time for some more discovery, formal or not, we have not had any problem getting information that we've needed and asked for.

And we would like the opportunity to more formally

detail those concerns, perhaps in briefing, if that is helpful for the Court.

But we're amenable to whatever makes the most sense to the parties at this point.

THE COURT: Okay. Why don't you just give me an overview, please, of the United States' concerns based on the valuation of the information that's been provided to the United States to date.

MS. PERCIA: Sure. So Gardendale, particularly Gardendale High School, is a pretty extraordinary facility and an educational hub for Jefferson County as far as we understand it. And there are a number of students that come into Gardendale from various communities, not only that are zoned there for explicit desegregation reasons, but who also come in to the school to use the really state-of-the-art facilities and some of its programs from surrounding areas.

There are basically a few groups of students, sort of north, west and south of Gardendale that are going to need to be rezoned as a result of the split. And they'll probably, according to our experts' analysis, and this is something that he did by looking at certain common criteria that a lot of school districts use when they need to rezone, things like school utilization, obviously geography, transportation times and feeder patterns, the most likely result of the separation is that students will be going

either to Mortimer Jordan High School, which is north of Gardendale, or Minor High School, which is north or southwest of Gardendale.

Mortimer Jordan is actually almost an equally lovely facility. It's pretty extraordinary. They are both really more like colleges than high schools. I would have loved to go to high school there. And they're something to be seen.

Mortimer Jordan, we didn't know until we visited, how extraordinary that facility is, but it's essentially identical to Gardendale in terms of the facility and the educational opportunities for students there.

Approximately two-thirds of white students in the transition zone would likely be zoned to Mortimer Jordan based on geography and transportation times.

I can go into a little bit more of the specifics, but I'll just stick with the flyover.

Only about twenty-seven percent of black students live in the transition zone would likely be zoned to Mortimer Jordan. The majority of black students, about seventy-five percent of them, would likely be zoned for Minor High School.

Minor High School is a starkly different experience in terms of the kind of educational opportunities that are available to the students there in the facility

itself. The facility was built in 1988 and is more or less consistent with a twenty-five plus year old facility.

In terms of the kind of education that the students are getting there, we would like to do a lot more information-gathering to give the Court a really clear picture of what goes on. But there are some stark differences. Students at Mortimer Jordan and Gardendale, for instance, the graduation rate there is about ninety-two to ninety-six percent, which is well above -- the state average is about seventy-four.

Students at Minor High School, the graduation rate is about sixty-six percent.

And in addition, Minor High School is an eighty-nine percent black high school and, as I said, Mortimer Jordan is ninety percent white.

In the aftermath of the split, if you remove Gardendale, it looks like the majority of white students are going to be rezoned to a predominately white high school that is essentially equivalent in terms of the facility and educational opportunities, the majority of black students will be rezoned to a predominantly black high school that is not a comparable facility along really any criteria.

So, we're concerned about that at the high school level.

My colleague has done more work on the middle

school level, but there are implications that look very similar along those lines.

So that is sort of how we narrowed our focus and we'd like to do a little bit more discovery along those lines.

In addition, you know, Gardendale has been used explicitly for desegregation reasons by the county, there is a group of students in North Smithfield that have been zoned to Gardendale explicitly for desegregation reasons and so the fact of the removal of that high school and that extraordinary facility from the system is something that implicates desegregation.

We haven't seen in Gardendale's proposed plan a way to resolve these concerns, so we wanted to take this opportunity to point some of those out and we would be happy to articulate those in more detail for the Court and for the parties so they can respond.

THE COURT: Okay. Thank you, Ms. Percia. I think your remarks make the Court feel like it would be beneficial for the Court to visit Gardendale High School, Mortimer Jordan and Minor High School, it probably makes sense for the Court to visit a couple elementary schools in the feeder patterns for those schools and middle schools.

So if you all will talk amongst yourselves, please, I don't know whether all of you feel like you want

to be present for that, you certainly are welcome to be present, but the Court will make arrangements with counsel to make those site visits.

In addition, the information that Ms. Percia is highlighting about outcomes from the various schools are going to be significant to the Court's analysis, so all of the parties need to be evaluating that information and deciding how they want to present that information to the Court.

Along those lines, information about the types of courses available at the different schools are going to be important. The Court wants to have information about the availability of AP courses, if there are special programs at, for example, Gardendale that aren't available at Mortimer Jordan or Minor, and if there are special programs that are available in some of the feeder schools for Gardendale that aren't available at other schools, the Court will want to know about that.

The Court also wants to have as specific information as possible about the ways in which Gardendale has been used to promote the goals of the Singleton order in this case and the constitutional mandate of the desegregation principles that animate this action.

The Court believes that it is appropriate to have a period of formal discovery. Within seven days, the Court

would like to have a proposed scheduling order from the parties for a formal period of discovery.

Ms. Percia, the briefing that you mentioned, my initial reaction is that it might be more productive to provide that briefing after you all have done some of this formal discovery and have some more concrete statistical information that you can provide to the Court.

Does that sound like a good approach to you?

MS. PERCIA: Yes, that is what we were hoping for.

THE COURT: So, include in that proposed scheduling order a briefing schedule for the parties to present some of this information to the Court.

What sort of discussions have you all had, if any, with respect to the concerns that Jefferson County had expressed about the potential loss of the Gardendale High School System without any sort of financial remuneration for loss of that facility? Mr. Colvin.

MR. COLVIN: Your Honor, we really, at this point, we really haven't had further discussions about that particular issue.

THE COURT: Okay.

MR. COLVIN: That still -- it still seems to be a threshold issue that the parties just have no agreement at all on and we have not attempted to reach middle ground.

But I think that is because we have been focusing

more on gathering information and allowing the parties who weren't parties to this earlier discussions to be able to take a position on the things that they need to.

THE COURT: That's fine. I just wanted to see if -- Mr. Rowe, is that consistent with your evaluation of what you all have been doing?

MR. ROWE: Yes, Your Honor. I think the financial end of it is somewhat tied up in the plan, you know, so that in our plan, we had a thirteen year transition period where the students who had been coming to Gardendale would continue to come to Gardendale.

And we've informally, at least I have informally discussed with Judge Clemon, perhaps, even a modification of that to make it look more like what the settlement agreement that was worked out in the Vestavia case years ago when he was the lawyer in that case, and we haven't -- beyond just about what I just said, we haven't had much discussion about that.

But I think that would impact -- say if we were able to reach an agreement that was satisfactory to the parties here, that we would continue to take certain students outside of Gardendale City Limits, as we proposed or a different program that everyone could agree on, then that would affect the potential need for money to change hands because perhaps the existing schools have capacity to

take the students. I hear the concern about Minor, and I'm not -- I'm not sure but I think most of those students would be the North Smithfield students which would be the -- most likely to be the ones that would be the subject of a Vestavia-like settlement agreement, if that was something that the parties were interested in and the Court would approve it.

So, you know, sorry for the long-winded response, but it's one thing if you're thinking of, well, no students other than, you know -- right now, we've got three thousand, roughly three thousand students that are in the Gardendale School System: High school and the middle school and the two elementary schools. And about twenty-three hundred of them are in the city limits. So about seven hundred are outside the city limits.

So what we're talking about is what happens to those kids. About four hundred of those are the Mount Olive kids, I presume a lot of those would be going to Mortimer Jordan because that's the closest high school. North Smithfield is about one hundred thirty kids, say one hundred fifty or less. Brookside, two hundred forty, so the Brookside and Mount Olive would be the ones that I'm presuming on a global basis would be closer to Mortimer Jordan, I may be wrong about some of those, but just globally.

So I think that these issues, if we could work out some agreement that would be satisfactory to the parties that the North Smithfield students would continue to come to Gardendale, then that may take away some of the issues that we're talking about and also might impact the need for more facilities.

We notice that in the recent data that was given to us after the school year started, that the number of students in the system went down a little bit.

So, you know, I'm not sure, you think that might mean there's a little bit more capacity than there was if the number had gone up. That is a real general statement, so it might not be true.

So those are the -- Whit is exactly right, we haven't had any discussions about money. But I think it's because we don't know the details of the plan, but we're ready to have those discussions.

THE COURT: Okay. I'm just trying to make sure I understand what work has and has not been done over the past few months since we last had a conference in the case.

MR. ROWE: Thank you.

THE COURT: Thanks.

MS. LIN-LUSE: Your Honor, if I may.

THE COURT: Yes, ma'am.

MS. LIN-LUSE: I wanted to add, make sure I

address two additional points.

One is, if going to do site visits, I think it would be important to go to Fultondale High, which is to the southeast of Gardendale, it also has a dramatic difference from the other facilities in Gardendale, including even Minor to the west or Center Point to the further east.

THE COURT: Do you know when Fultondale was constructed, by any chance?

MS. LIN-LUSE: I do. I have it in my notes back there. However, it's older than Minor and the other schools that were built on the same funds.

Additionally, I wanted to raise -- to make sure the Court was aware that not only are we concerned about student assignment and share the same concerns that the Department of Justice has raised with regard to what the impact would be on the desegregative capacity of Jefferson County with the separation of Gardendale, but also concerned about faculty and staff assignment and the impact that the shift will have on the ability to address issues that Jefferson County still has with regard to faculty and staff assignment.

One of the things that I think is important to highlight is that because -- not only is it the impact of the students that are there, but it also limits the ability to have further desegregation, so it's not even where it is

now, but given its geographic location, we would like to see an improvement on faculty and staff assignment in the Gardendale schools and the schools surrounding it, and by the removal of the separation of Gardendale, that limits the capacity to make those strides forward that we would be working with Jefferson County to address.

THE COURT: You touched on something that the Court, I believe, addressed early on in our discussions but remain a significant concern for the Court, and that is the Court doesn't want to get so focused on the Gardendale issue that it loses perspective on the bigger Jefferson County issue, the Court has to be concerned with the desegregation goals over all for Jefferson County.

And looking, for example, at the joint report that the parties made to the Court, it's document 998, this was provided to the Court in February of this year, on Page 9, there's a chart that shows the student population by race across the district and that chart illustrates that the percentage composition of Jefferson County, of the student population of Jefferson County, has changed pretty dramatically from 2002 until 2014.

And the Court can perhaps -- there's at least a correlation in part between the decrease in the number of -- the percentage of Caucasian students within the Jefferson County system and the increase of African-American -- the

percentage of African-American students within the Jefferson County system with the Cahaba Heights annexation, which occurred in 2002, the creation of the Leeds system, which occurred in 2003, and the creation of the Trussville system, which occurred in 2005.

And the Court maintains its concern that as long as Jefferson County is having to address splinter districts than separate from the system, it's difficult to see how the Court can accomplish its directive from the U.S. Supreme Court that the Federal Court is suppose to leave the business of monitoring these school systems but for school systems to be able to achieve a declaration of unitary status, the school system can't always be dealing with a moving target. And that's part of the Court's more global concern in Jefferson County.

The Court feels like the parties should pay close attention to the U.S. Supreme Court decision in City of Emporia and some of the remarks that are made in Stout I and Stout II, Judge Albritton's decision in the Lee case where Judge Albritton was examining splinter district issues, are instructive in this situation. And when the parties are briefing, the Court wants the parties to make sure they pay special attention to that authority and give the Court their guidance on how they think that those — that authority weighs on the Court's decision with respect to Gardendale

and with respect to the more comprehensive issue of Jefferson County's ability to obtain a declaration of unitary status. You know, this is a 1965 case and I believe in Brown II that the Supreme Court told the courts that we were suppose to accomplish desegregation quickly. And I don't think the Supreme Court would view our work here in 2015 as a quick resolution of desegregation issues.

So I just ask the parties to keep all of that in mind as they're doing their work.

Mr. Sweeney, I see you're here for the City of Hoover.

MR. SWEENEY: Yes, ma'am. The parties are engaged in, I think, very constructive dialogue. I have proposed a scheduling order last week that the parties are going to discuss today. To finalize, one of the suggestions is that if there is a necessity of having a trial, which we're very optimistic won't happen, but that we were proposing that we suggest a two-day block around March 21st with the hope that Your Honor could make a decision in early April in order for Hoover to make the necessary adjustments of student zones and faculty assignments. But with that objective, I wonder if it would be permissible for the Court, with the Court, if we provide a scheduling order that the parties have agreed to within the next week, as you have asked in the Stout case.

THE COURT: That would be terrific, Mr. Sweeney, if you all please work on that. The Court will look forward to receiving that submission.

Mr. Sweeney, a question about the reports that the City of Hoover provided for 2015, I think those were by and large comprehensive. The one thing that seemed to be missing from the 2015 report was the class count report, is that material that the City of Hoover is still planning to provide to the Court?

MR. SWEENEY: Yes, ma'am. And I advised the parties that that should be available at the end of this week. I'm tracking the same submittal that was provided last year, they're in the process of assembling that data now.

THE COURT: Okay. Very good. Is there anything else from the United States or from the private plaintiffs with respect to the City of Hoover?

MS. KING: No, Your Honor. I just want to echo what Mr. Sweeney said, that we have been working very productively together and I think we will be on track to provide the Court with a scheduling order.

THE COURT: Great.

MS. LIN-LUSE: Your Honor, I would only clarify, I think at this point the plaintiffs are interested, as we presented to the Court the last time we were here, in first

addressing the student assignment issues that are sort of the most pressing and important for us to address, and so hopefully our scheduling order will be focused in on getting that proposal addressed.

What I would like to see as opposed to a full comprehensive consent decree, that we may want to focus in on student assignment, as that is an issue that has been worked on and negotiated, and we can address other issues to do that as well, but as we move forward on that particular issue, it's important to all of the parties and creates the most change that will take place within the district.

THE COURT: Okay. Well, I will probably need from the parties is some more specifics about the concerns that the private plaintiffs have, any concerns that the United States has, so that the Court has a little bit of background before engaging in more formal conversation with the parties about the work that you all have been doing.

If you all can perhaps provide a little bit of a summary to the Court to give me some context to evaluate the information that you will provide as time progresses, that would be great.

All right. Is there anything else that any of the parties would like to bring to the Court's attention at this time?

MS. PERCIA: I would just add, Your Honor, that I

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agree with Ms. Lin-Luse that it's worth visiting Fultondale. We visited that school as well for utilization reasons and in our analysis, we don't know what it would look like --

THE COURT: Well, let the parties get together, please, and you all propose a list of schools for the Court to visit. And then we will coordinate with you all on a time and procedure for doing that.

All right. Thank you very much for your time this morning. I look forward to working with you all in the case more.

I just remembered something. The way that the parties present transfer information to the Court only allows the Court to do -- it doesn't allow us to get into the specifics of where people are coming from, you know, where they're going, so we have a report that we used in the Huntsville case that gives the Court more details to be better educated about what those transfer numbers mean.

Katie will supply one of those reports to you all and would like to request that that transfer information be made available to the Court for Jefferson County in that fashion.

Thank you.

(COURT ADJOURNED)

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CERTIFICATE I hereby certify that the foregoing is a correct transcript from the record of proceedings in the above-referenced matter. Teresa Roberson, RPR, RMR